

# Department of Developmental Services RFP HD239038

## FMS Scope of Work

Intent to Award: [Applied Self-Direction, LLC](#)

### 1. General Provisions

The following provisions shall apply to all project tasks:

- a. The Proposer shall assign a project representative who will be responsible for all project deliverables. The Proposer shall provide the Department with the project representative's resume, email address, office phone number, and mobile phone number.
- b. The Proposer shall provide resumes for all key personnel who will work on the project including the names and contact information for any subcontractors.
- c. The Proposer shall describe the process they will use to obtain the Department's agreement with any staff changes that occur between the submission of the proposal and actual project implementation and any staff changes during project implementation.
- d. The Department must approve, prior to their use, all deliverables, including but not limited to the method of providing the training, content of all training materials and the method of certification.
- e. All training modules, delivery methods and tools must comply with the Americans with Disabilities Act and Section 508 of the Rehabilitation Act of 1973 as amended (29 U.S.C. Section 784).
- f. The Proposer shall provide all original materials utilized and source materials developed during this project, and solely for this project, as requested by the Department.
- g. The Department shall fully own all products and intellectual property which is developed under this contract.

### 2. Project Deliverables

- a. Develop a certification program for potential FMS providers utilizing the Department developed framework for the FMS Standards (Resources, Section F).

- b. Make available through acquisition or development, an asynchronous online competency based learning program which is accessible with and available through web-based learning management system (LMS) identified by the Department in various formats for FMS providers, providers who are currently vendored to provide FMS services in the SDP, FMS services in the process of vendorization and FMS agencies for which the training is requested by the FMS, regional center, or the Department.
- c. Provide training to at least one director or administrator of each entity which intends to provide, or is currently providing, financial management services for SDP participants by the date agreed to by the Department and the Contractor. A list of current FMS providers can be found on the Department's website.
- d. Develop a method and standard(s), such as a post-test with a required pass rate, to assess the FMS providers' competency of the required standards and skills to support SDP participants and certify those providers who demonstrate mastery of the required standard(s) and skill(s).
- e. Develop the training in such a way that it will support certification upon mastery of the standards, and issuance of the certification, within a 30-day period.
- f. Through the contract period, maintain an updated list of FMS providers who have demonstrated that they meet the Department's identified requirements and have received certification. Provide each training participant with a certificate or other means of verifying they have completed the training and demonstrated mastery. Establish and provide ongoing updates to such list so that it can be part of an online portal through the Department-created LMS allowing for the Department and regional centers to obtain information about certified staff for FMS providers.
- g. Provide the Department with a quarterly report about the training and certification program, including data about the number of individuals participating in the trainings, feedback about the trainings and recommendations to address any barriers to FMS providers successfully completing the training and ways to improve the training and certification program.

## *Resources, Section F*

### **Department Framework for Financial Management Services (FMS) Standards**

FMS standards shall include, but are not limited to, the following topics and categories:

#### Qualifications

- Education and training requirements
- Regional center vendorization requirements
- Eligible to provide services per Welfare & Institution Code sections 141123(a), 14123(b), and 14043.6.

#### Skills & Knowledge

- California Self-Determination Program (SDP)
- California's Federal SDP waiver and applicable state laws and regulations
- California regional center system
- Accounting and budget management
- Person-centered planning
- Communication with individuals from diverse communities
- Cultural competency

#### Professional Standards

- Code of ethics
- Performance expectations

#### Reporting & Documentation

- Comprehensive written agreement with participant
  - Scope of services
  - Administrative responsibilities
  - Discontinuation of services policy
- Monthly spending report summary of services
- Complaint reporting
- Special Incident Reporting